

# OM200- Organizational Management Reference Guide

## PPOSE Navigation Tips












# OM Navigation

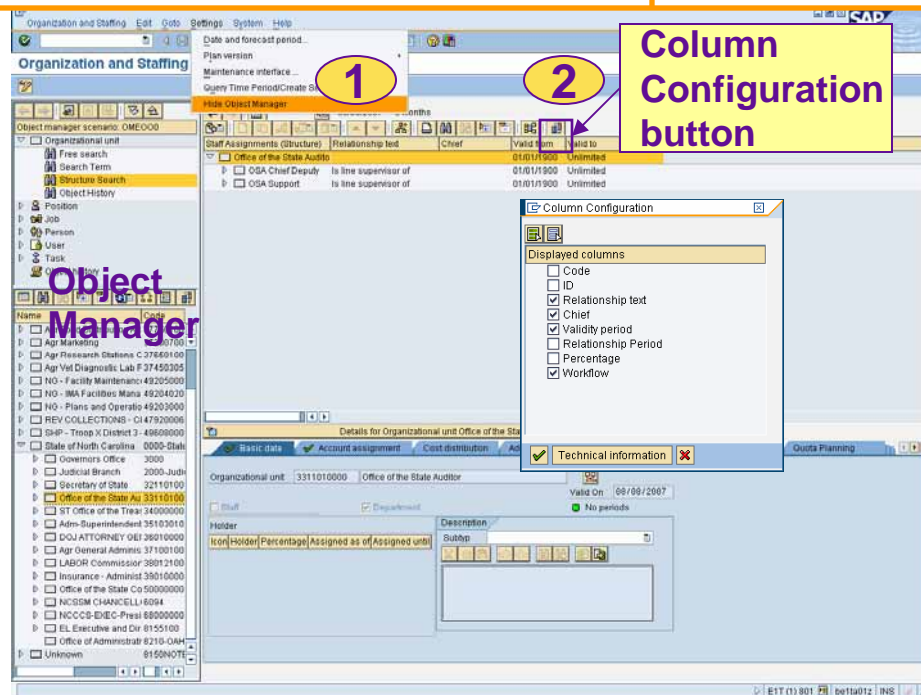
## OM Object Relationship Types

Relationship Type	Relationship Description
Reports (line) to (A/002)	Org Unit to Org Unit
Is line supervisor of (B/002)	Org Unit to Org Unit
Cost Center (A/011)	Org Unit to Cost Center
Incorporates (B/003)	Org Unit to Position
Is Managed by (B/012)	Org Unit to (Chief) Position
Describes (A/007)	Job to Position
Belongs to (A/003)	Position to Org Unit
Is described by (B/007)	Position to Job
Holder	Person to position

## SAP Icons

Use the following icon legend to identify organizational objects displayed in SAP:

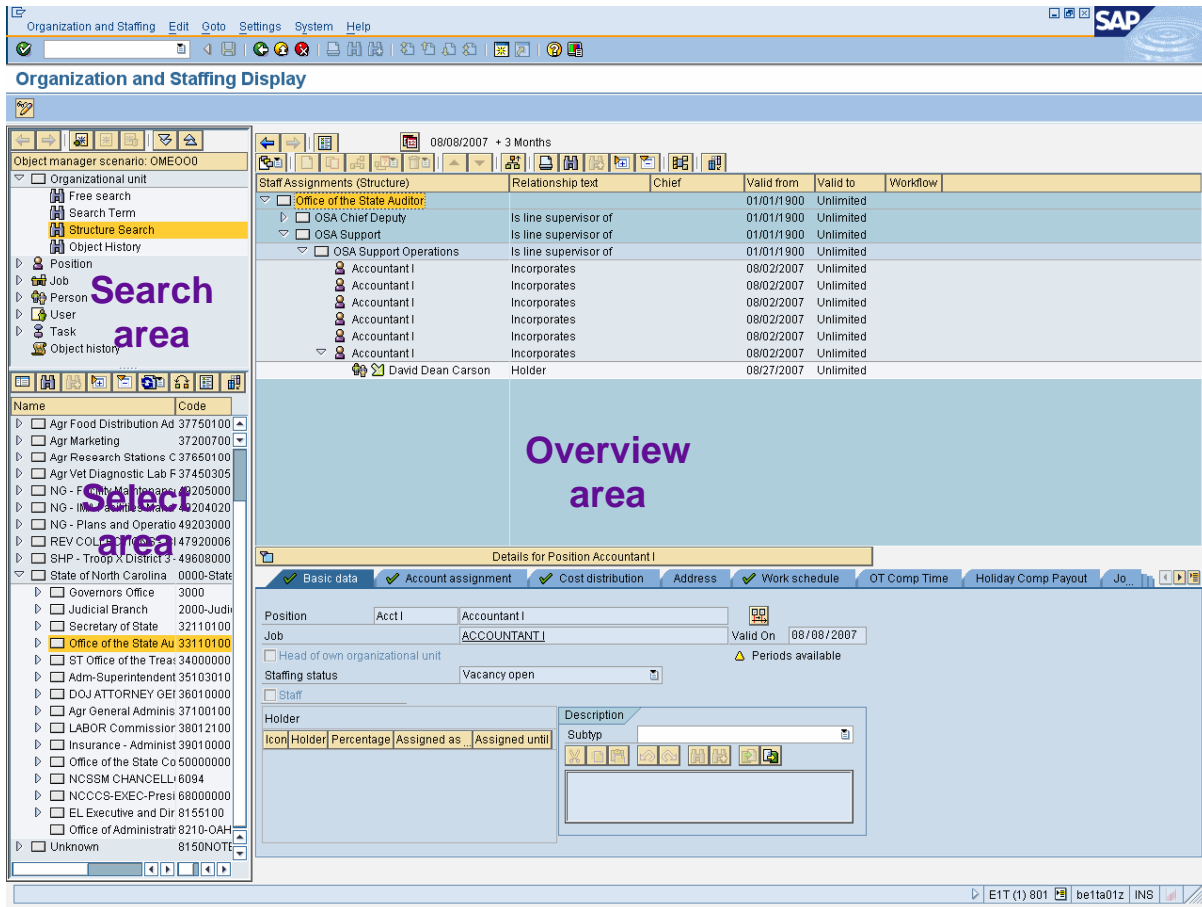
	Job
	Organizational unit
	Person
	Position
	Task
	User
	Chief
	Vacant position
	Unoccupied position
	Obsolete Position
	Position with several holders



## Hide/Show Object Manager

1. To hide or show the Object Manager, select the Settings menu.
2. To select the columns to be displayed click the Column Configuration button.

# PPOSE Screen Layout










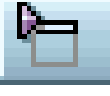
The screenshot shows the 'Organization and Staffing Display' window. The top menu bar includes 'Organization and Staffing', 'Edit', 'Goto', 'Settings', 'System', and 'Help'. The main window is divided into four sections:

- Search area:** Located in the top left, it contains a search bar and a list of search criteria including 'Free search', 'Search Term', 'Structure Search', 'Object History', 'Position', 'Job', 'Person', 'User', 'Task', and 'Object history'.
- Select area:** Located in the bottom left, it displays a list of organizational units with columns for 'Name' and 'Code'. The list includes various departments like 'Agr Food Distribution Ad', 'Agr Marketing', 'Agr Research Stations C', 'Agr Vet Diagnostic Lab F', 'NG - F...', 'NG - I...', 'NG - Plans and Operatio', 'REV COL...', 'SHP - Troop X District 3', 'State of North Carolina', 'Governors Office', 'Judicial Branch', 'Secretary of State', 'ST Office of the Treas', 'Adm-Superintendent', 'DOJ ATTORNEY GEI', 'Agr General Adminis', 'LABOR Commissioner', 'Insurance - Administ', 'Office of the State Co', 'NCSSM CHANCELL', 'NCCCS-EXEC-Presi', 'EL Executive and Dir', 'Office of Administrat', and 'Unknown'.
- Overview area:** Located in the top right, it displays a table of staff assignments. The table has columns for 'Staff Assignments (Structure)', 'Relationship text', 'Chief', 'Valid from', 'Valid to', and 'Workflow'. The data shows a hierarchy starting with 'Office of the State Auditor' and 'OSA Chief Deputy', followed by 'OSA Support' and 'OSA Support Operations', which then lists several 'Accountant I' positions.
- Detail area:** Located in the bottom right, it shows details for a selected position, 'Accountant I'. It includes tabs for 'Basic data', 'Account assignment', 'Cost distribution', 'Address', 'Work schedule', 'OT Comp Time', 'Holiday Comp Payout', and 'Jo...'. The 'Basic data' tab is active, showing fields for 'Position', 'Acct I', 'Accountant I', 'Job', 'Valid On', 'Staffing status', 'Vacancy open', 'Holder', 'Description', and 'Subtyp'.

This is the initial screen for displaying the organization and staffing structure.

- **Search area** – The top left portion of the screen, which is used to search for individual organizational objects according to your search criteria.
- **Select area** - The bottom left portion of screen is the Selection area (search results area), where the organizational objects appropriate to your search appear. By double-clicking on an object in this area, you can transfer the object to the top right portion of the screen, which is the Overview area.
- **Overview area** - In the overview area, you can view the object within its appropriate organizational environment.
- **Detail area** - The bottom area of the screen, referred to as the Detail area, is where you can view the object in more detail.

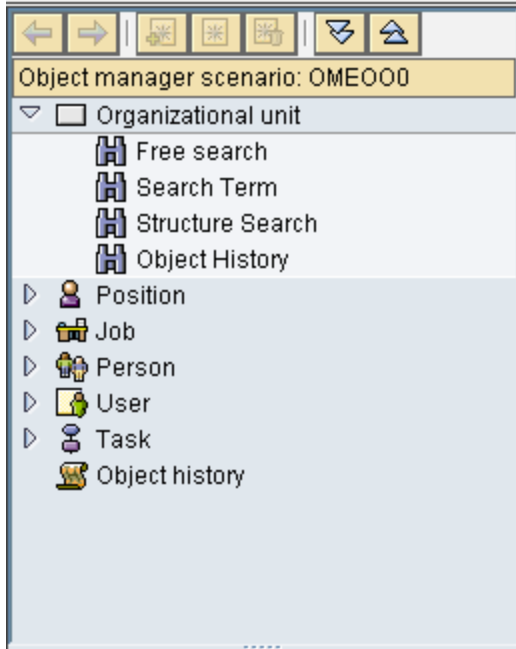
## PPOSE screen buttons

Button	Description
	The “Goto” button allows you to view the organizational structure in different ways. For example, by selecting Organizational structure you can view only the organizational units without any position information. By selecting Staff assignments (structure), you can view both the organizational units and the positions attached to them.
	The “One level up” button allows you to view the structure one level above the point you are currently viewing.
	The “Column Configuration” button allows you to select the columns you would like to view for example, Object ID Number or Validity Period.
	The “Icon legend” button allows you to view a legend of what various icons represent within the organizational structure.
	The “Large/small results list” button allows you to maximize or minimize the view of the search area.
	The “Date and preview period” button allows you to view the organizational and reporting structure as of a specified past, present, or future date.
	This button minimizes the Detail area of the screen to expand the Overview area.
	This button maximizes the Detail area of the screen to view the detailed information pertaining to an object.


# PPOSE Procedure

## To change the organization you are viewing:

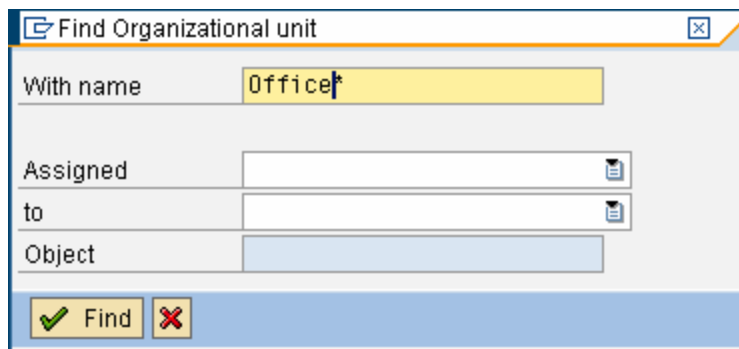
1. Ensure you have the Object Manager window displayed on the left side of the screen. It looks like this:

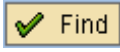


If the Object Manager does not appear on your screen, use the menu path Settings > Show Object Manager (this same menu path allows you to hide the Object Manager if you do not need to search for other organization units).

Click on  Search Term in the top panel to open a search window.

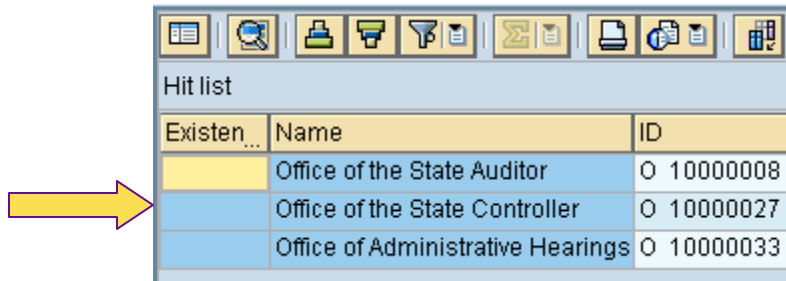
2. From the search window, enter the text name of the org unit you are searching for, or alternatively, enter the 8-digit org unit number.



3. Click the  Find button to generate a list of org units matching your search criteria.

## PPOSE Procedure (Con't)

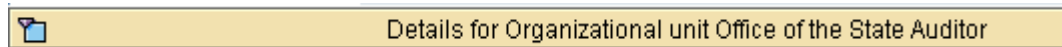
- Look in the results pane (the bottom portion of the Object Manager) and double click on the organization unit for which you wish to display the organizational structure.



Existen...	Name	ID
	Office of the State Auditor	O 10000008
	Office of the State Controller	O 10000027
	Office of Administrative Hearings	O 10000033


### To hide the details section of the screen:

- To toggle the details of the screen contains some additional details for each org unit, position, or person selected, but can be hidden to make it easier to view the org structure.

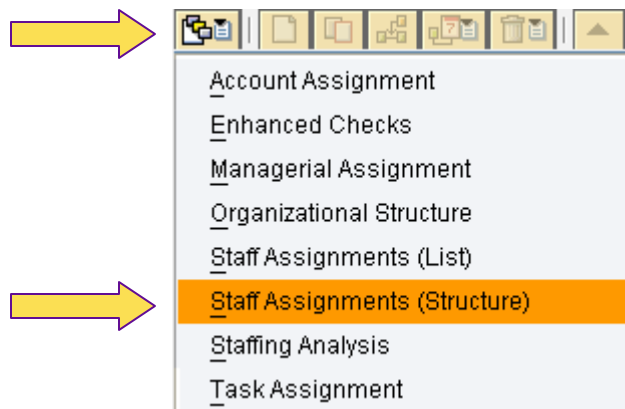


The details section of the screen contains some additional details for each org unit, position, or person selected, but can be hidden to make it easier to view the org structure.

### To view the organizational structure:

- There are several different types of views available from the Organization and staffing Display screen. To show org units, positions (including the "chief" designation), and people, click the Goto  button (located in the menu bar above the main





section of the window) and select *Staff assignments (structure)*




# PPOSE Procedure (Con't)

## To view the organizational structure (Continued):

- You can view different parts of the organization using the key below:

Icon	Description
	This icon denotes an organizational unit. The long text description is noted immediately to the right of the icon, and the short text description is available in the "Code" column. The name of the person holding the "chief" position for this organizational unit is listed in the "Chief" column.
	This icon denotes a position and is listed under the appropriate organizational unit. The long text description is noted immediately to the right of the icon, and the short text description is available in the "Code" column.
	This icon denotes the "chief" position for an organizational unit. A position becomes a "chief" position when the relationship "Manages..." is established between the position and org unit to signify the org unit manager.
	This icon denotes a person. People are listed under the positions that they are holding.

## To view other options

- To view other options, click the Column configuration button  on the toolbar. This lets you view other information about the organization you are viewing (such as relationship description, the ID numbers for each organizational object.

